

## Chapter 2 - Project Setup

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## Project Setup

### Registration

**Define Names**  
Subdivisions, Categories, Other ID Fields, Label Names for Additional Doses Admin. Fields

**Enrollment**  
Calculate Eligible Enroll Auto, Public/Private %, Type of Data Used to Define Profiles

**Doses Admin.**  
Alternate Forms, Enabling, Profile Info.

**Misc.**  
Pop-Up List Info, Expire on Date Info.

#### Setup - Enrollment

- Calculate 2011 Vaccine enrollment automatically?
- Calculate 2012 Vaccine enrollment automatically?
- Enrollment data for persons older than 18 years?

Indicates for greater profile enrollment data:

When CPT calculation requires for:

Public	Private
0.01%	0.01%
0.01%	0.01%
0.01%	0.01%

Total enrollment: 0.01% 0.01%

Type of data used to determine profile (choose all that apply):

- A. Demographics
- B. Medical History
- C. Provider Information
- D. Other
- E. Vaccine Administration
- F. Vaccine Administration
- G. Vaccine Administration
- H. Vaccine Administration

#### Setup - Doses Administered

- Use alternate form with auto enrollment across the form?
- Enable vaccine lookup in vaccine overview field?
- Enable vaccine in vaccine field?
- Report vaccine from past records?
- Allow past all age groups to administer - all possible?
- Allow past all age groups to administer - private provider only?
- Allow to age 1 year if dose 1 or 2 or 3 or 4 or 5 or 6 or 7 or 8 or 9 or 10 or 11 or 12 or 13 or 14 or 15 or 16 or 17 or 18 or 19 or 20 or 21 or 22 or 23 or 24 or 25 or 26 or 27 or 28 or 29 or 30 or 31 or 32 or 33 or 34 or 35 or 36 or 37 or 38 or 39 or 40 or 41 or 42 or 43 or 44 or 45 or 46 or 47 or 48 or 49 or 50 or 51 or 52 or 53 or 54 or 55 or 56 or 57 or 58 or 59 or 60 or 61 or 62 or 63 or 64 or 65 or 66 or 67 or 68 or 69 or 70 or 71 or 72 or 73 or 74 or 75 or 76 or 77 or 78 or 79 or 80 or 81 or 82 or 83 or 84 or 85 or 86 or 87 or 88 or 89 or 90 or 91 or 92 or 93 or 94 or 95 or 96 or 97 or 98 or 99 or 100 or 101 or 102 or 103 or 104 or 105 or 106 or 107 or 108 or 109 or 110 or 111 or 112 or 113 or 114 or 115 or 116 or 117 or 118 or 119 or 120 or 121 or 122 or 123 or 124 or 125 or 126 or 127 or 128 or 129 or 130 or 131 or 132 or 133 or 134 or 135 or 136 or 137 or 138 or 139 or 140 or 141 or 142 or 143 or 144 or 145 or 146 or 147 or 148 or 149 or 150 or 151 or 152 or 153 or 154 or 155 or 156 or 157 or 158 or 159 or 160 or 161 or 162 or 163 or 164 or 165 or 166 or 167 or 168 or 169 or 170 or 171 or 172 or 173 or 174 or 175 or 176 or 177 or 178 or 179 or 180 or 181 or 182 or 183 or 184 or 185 or 186 or 187 or 188 or 189 or 190 or 191 or 192 or 193 or 194 or 195 or 196 or 197 or 198 or 199 or 200 or 201 or 202 or 203 or 204 or 205 or 206 or 207 or 208 or 209 or 210 or 211 or 212 or 213 or 214 or 215 or 216 or 217 or 218 or 219 or 220 or 221 or 222 or 223 or 224 or 225 or 226 or 227 or 228 or 229 or 230 or 231 or 232 or 233 or 234 or 235 or 236 or 237 or 238 or 239 or 240 or 241 or 242 or 243 or 244 or 245 or 246 or 247 or 248 or 249 or 250 or 251 or 252 or 253 or 254 or 255 or 256 or 257 or 258 or 259 or 260 or 261 or 262 or 263 or 264 or 265 or 266 or 267 or 268 or 269 or 270 or 271 or 272 or 273 or 274 or 275 or 276 or 277 or 278 or 279 or 280 or 281 or 282 or 283 or 284 or 285 or 286 or 287 or 288 or 289 or 290 or 291 or 292 or 293 or 294 or 295 or 296 or 297 or 298 or 299 or 300 or 301 or 302 or 303 or 304 or 305 or 306 or 307 or 308 or 309 or 310 or 311 or 312 or 313 or 314 or 315 or 316 or 317 or 318 or 319 or 320 or 321 or 322 or 323 or 324 or 325 or 326 or 327 or 328 or 329 or 330 or 331 or 332 or 333 or 334 or 335 or 336 or 337 or 338 or 339 or 340 or 341 or 342 or 343 or 344 or 345 or 346 or 347 or 348 or 349 or 350 or 351 or 352 or 353 or 354 or 355 or 356 or 357 or 358 or 359 or 360 or 361 or 362 or 363 or 364 or 365 or 366 or 367 or 368 or 369 or 370 or 371 or 372 or 373 or 374 or 375 or 376 or 377 or 378 or 379 or 380 or 381 or 382 or 383 or 384 or 385 or 386 or 387 or 388 or 389 or 390 or 391 or 392 or 393 or 394 or 395 or 396 or 397 or 398 or 399 or 400 or 401 or 402 or 403 or 404 or 405 or 406 or 407 or 408 or 409 or 410 or 411 or 412 or 413 or 414 or 415 or 416 or 417 or 418 or 419 or 420 or 421 or 422 or 423 or 424 or 425 or 426 or 427 or 428 or 429 or 430 or 431 or 432 or 433 or 434 or 435 or 436 or 437 or 438 or 439 or 440 or 441 or 442 or 443 or 444 or 445 or 446 or 447 or 448 or 449 or 450 or 451 or 452 or 453 or 454 or 455 or 456 or 457 or 458 or 459 or 460 or 461 or 462 or 463 or 464 or 465 or 466 or 467 or 468 or 469 or 470 or 471 or 472 or 473 or 474 or 475 or 476 or 477 or 478 or 479 or 480 or 481 or 482 or 483 or 484 or 485 or 486 or 487 or 488 or 489 or 490 or 491 or 492 or 493 or 494 or 495 or 496 or 497 or 498 or 499 or 500 or 501 or 502 or 503 or 504 or 505 or 506 or 507 or 508 or 509 or 510 or 511 or 512 or 513 or 514 or 515 or 516 or 517 or 518 or 519 or 520 or 521 or 522 or 523 or 524 or 525 or 526 or 527 or 528 or 529 or 530 or 531 or 532 or 533 or 534 or 535 or 536 or 537 or 538 or 539 or 540 or 541 or 542 or 543 or 544 or 545 or 546 or 547 or 548 or 549 or 550 or 551 or 552 or 553 or 554 or 555 or 556 or 557 or 558 or 559 or 560 or 561 or 562 or 563 or 564 or 565 or 566 or 567 or 568 or 569 or 570 or 571 or 572 or 573 or 574 or 575 or 576 or 577 or 578 or 579 or 580 or 581 or 582 or 583 or 584 or 585 or 586 or 587 or 588 or 589 or 590 or 591 or 592 or 593 or 594 or 595 or 596 or 597 or 598 or 599 or 600 or 601 or 602 or 603 or 604 or 605 or 606 or 607 or 608 or 609 or 610 or 611 or 612 or 613 or 614 or 615 or 616 or 617 or 618 or 619 or 620 or 621 or 622 or 623 or 624 or 625 or 626 or 627 or 628 or 629 or 630 or 631 or 632 or 633 or 634 or 635 or 636 or 637 or 638 or 639 or 640 or 641 or 642 or 643 or 644 or 645 or 646 or 647 or 648 or 649 or 650 or 651 or 652 or 653 or 654 or 655 or 656 or 657 or 658 or 659 or 660 or 661 or 662 or 663 or 664 or 665 or 666 or 667 or 668 or 669 or 670 or 671 or 672 or

## Customized Setup Overview

Projects are required to perform a *Customized* section setup at least once after installing VACMAN. The *Customized* section setup involves:

- *Registering* your project
- *Defining names* for customized windows and fields
- Defining calculations and default options for the *Enroll Demographics* window
- Defining calculations and default options for the *Doses Administered* window
- Establishing *Miscellaneous* default behaviors for various windows
- Entering commonly used *Zip codes*
- Entering commonly used *Counties*
- Setting up *Depots*
- Setting up *Manufacturers*
- Entering *Vaccine* information
- Entering *Funding* information
- Viewing *CDC Contracts*

## Registration Tab

Use the Registration tab to enter specific information about your project. Except for contact information, it is uncommon for this information to change once it has been entered.

The screenshot shows the 'Setup - Data Options' window with the 'Registration' tab selected. The window title bar includes standard Windows window controls. The 'Registration' tab is active, showing a form for project registration. The form fields are as follows:

Setup - Registration	
Project	YOUR STATE'S IMMUNIZATION PROGRAM
Contact	YOUR PROJECT MANAGER / CONTAT
Address	123 MAIN STREET SUITE 2200
City	MAGNOLIA
State	GA
Zip Code	30303
Phone	(555) 555-1212
Extension	
Fax	(555) 555-1212
Email	yourEmailaccount@xyz.xyz

Registration data is sent to CDC regularly, so please keep this updated!

## Registration Field Descriptions

Field	Use this field to enter:
<b>Project</b>	Your project's name.
<b>Contact</b>	The name of your VACMAN end-user who answers questions about your project's VACMAN account.
<b>Address</b>	Your project's physical address. This field should not be confused with your project's depot address.
<b>City</b>	The city in which your project is located.
<b>State</b>	The state in which your project is located.
<b>Zip code</b>	The zip code in which your project is located.
<b>Phone</b>	Your project's main phone number or the direct phone number to your VACMAN contact.
<b>Extension</b>	The extension number of your VACMAN contact.
<b>Fax</b>	The fax number for your VACMAN personnel.
<b>Email</b>	The email address to your project's VACMAN contact.

## Define Names Tab

Use the Define Names tab to customize names of various fields that appear within the Enroll Provider, Edit Physician, Doses Administered, and Inventory windows. Also, you can add unique titles to your customizable pop-up windows. These customizable field and window titles are divided into these general sections: provider, physician, additional inventory field and label names for additional doses administered fields.

Setup - Define Names	
Subdivisions	DISTRICT
Provider category 1	SOLO/GROU
Provider category 2	PED/FAM/IN
Provider category 3	OTHER
Provider category 4	
Provider category 5	
Additional Provider ID field	FEDERAL ID
Physician ID	FACILITY ID
Physician other 1	PHYS ID
Physician other 2	MEDIC GROU
Additional inventory field	ORDER NO.
Label Names for additional Doses Administered fields:	
Field 1	MEDICAID
Field 2	UNINSURED
Field 3	UNDERINS
Field 4	
Field 5	
Field 6	
Field 7	
Field 8	

## Provider Section

The Provider section allows you to name three types of fields and windows: Subdivisions, Category, and one additional field. To name fields in any of these sections, click the **Edit** button, enter the new field names, and click the **Save** button.

### Subdivisions

Entering a value in the Subdivisions field serves two purposes: it names the respective field in the Enroll Providers window, and titles the Subdivisions window. The Subdivisions window is used to enter contact information, a code, and a description for the subdivision.

Use the Subdivisions window to record contact information relative to the regions or subdivisions that your project distributes vaccines. The records you enter in this window become available in a drop-down list wherever a Subdivisions field is present.

### Provider category fields, 1 - 5

The Provider Category fields (1-5) are displayed on the *Enroll Provider* window. When you name these fields, you will see the names appear as their respective field titles on the Enroll Providers window.

In addition, you will see the names you assign to these fields appear as the names of the Category links on the Setup tab on *VACMAN at a Glance*.

Finally, the names you assign to these fields will also be used as the names for their respective windows when you click on those links. The values you enter in these windows become the selections you can choose from in their respective fields on the Enroll Providers window.

### Additional Provider ID Field

The Additional Provider ID field can be named and used in any way that is appropriate to your project. The value you enter for this field names an additional field on the Enroll Provider window. After naming this field, you can go to the Enroll Provider window and type in any text or numeric value for the field.

## **Physician Section**

Use this section to name three fields: Physician ID, Physician other 1 and Physician other 2. All of these fields appear on the Edit Physician window with the titles you enter in this section. Projects often rename the ID field to "Tax ID #" or "Medicaid #." Physician other 1 and 2 can be used in any way that is appropriate to your project. For example, you might want to name these fields "License #" and "Pub/Priv" where you could record the physician's license number and whether the physician is a public or private practitioner. After naming these fields, go to the Edit Physician window and type in any text or numeric values.

## **Label names for additional doses administered fields**

Use this section to name up to eight miscellaneous fields that appear on the Doses Administered window. Medicaid eligibility, uninsured, underinsured, and American Indian are names often given to the miscellaneous fields. After naming these fields, use the Doses Administered window and type in any numeric value.

## **Additional inventory field**

Use this field to name one additional inventory field called Field 1. This is for Non-CDC Inventory. This field appears on the Bulk Orders window and Non-CDC Inventory window.

## Enrollment Tab

Use the Enrollment tab to establish the default options and statistical percentages for the Enrollment Demographics window.

The three main sections to the Setup-Enrollment window are:

1. Enrollment Defaults - Determines the default behaviors for fields on the Enroll Demographics window.
2. Profile Defaults - Determines the total number of doses a Provider can order based on the total number of non-VFC eligible children who need immunizations.
3. Profile Data - Determines the sources in which your project derives its percentages in the Profile Defaults Section.

**Setup - Data Options**

Registration | Define Names | **Enrollment** | Doses Admin | Misc

### Setup - Enrollment

☒ Calculate G317 Eligible enrollment automatically?  
☒ Calculate State eligible enrollment automatically?  
☐ Enrollment data for persons older than 18 years?

**Defaults for provider profile enrollment data:**  
**Non-VFC children eligible for:**

	Public	Private
G317	30 %	0 %
State	70 %	100 %
<b>Total non-VFC</b>	<b>100 %</b>	<b>100 %</b>

☒ Apply these defaults to future profile updates  
☐ Apply to ALL profiles

**Type of data used to determine profile (check all that apply):**

<input type="checkbox"/> A Benchmarking	<input type="checkbox"/> E Vaccine Replacement
<input type="checkbox"/> B Medical Claims	<input type="checkbox"/> F Doses Administered
<input type="checkbox"/> C Provider Encounter	<input type="checkbox"/> G Prior Ordering
<input type="checkbox"/> D Registry	<input type="checkbox"/> Z Other

## Setup Enrollment Field Descriptions

Field	Description
<b>Enrollment Defaults</b>	
This section allows you to select default behaviors for fields on the Enrollment Demographics window.	
Calculate G317	When you select this field, VACMAN will automatically calculate the number of children that are eligible for using G317 funding in the Enroll Demographics window.
Calculate State	When you select this field, VACMAN will automatically calculate the number of children that are eligible for using State funding in the Enroll Demographics window.
Older than 18 years	When you select this field, VACMAN will automatically calculate enrollment data for eligible candidates who are older than 18 years in the Enroll Demographics window.
<b>Population Estimates</b>	
This section establishes the total number of doses a Provider can order based on the total number of non-	



Field	Description
VFC eligible children who need immunizations.	
G317 Public	This field is used to enter a percentage that represents the number of children in a population who qualify to receive vaccines using G317 public funding.
G317 Private	This field is used to enter a percentage that represents the number of children in a population who qualify to receive vaccines using G317 private funding.
State Public	This field is used to enter a percentage that represents the number of children in a population who qualify to receive vaccines using State public funding.
State Private	This field is used to enter a percentage that represents the number of children in a population who qualify to receive vaccines using State private funding.
Apply to updated profiles	This field is used to apply the above percentages only to profiles that are updated after the current date.
Apply to all profiles	This field is used to apply the above percentages to all profiles.
<b>Source Data</b>	
This section allows you to select the sources from which your project derives its percentages.	
Benchmarking	A process of collecting data over a set time frame (preferably three months), which are used to calculate an estimation for the same data over a larger time frame (usually a one-year period following the benchmark).
Medical Claims	A retrospective collection of data derived from medical claims that are used to calculate an estimation for the same data over a larger time frame (usually a one-year period following the benchmark). This data can be collected from a one-year time frame, or from benchmarking any period of time.
Provider Encounter	A retrospective collection of the number of children who went to a specific Provider, regardless of whether or not they received any immunizations. This data can be collected from a one-year time frame, or from benchmarking any period of time.
Registry	Registry represents the State Immunization Registry. States store information (including the number of immunization vaccines given to children) into a statewide electronic database called a Registry. Projects can use the electronic data to determine their vaccine enrollment data for the State. This data can be collected from a one-year time frame, or from benchmarking any period of time.
Vaccine Replacement	A retrospective collection of the number of vaccine doses that a project distributes to a Provider. This data are then used to recalculate the number of doses the Provider administers. This data can be collected from a one-year time frame, or from benchmarking any period of time.
Doses Administered	A retrospective collection of the number of vaccine doses that a Provider administers regardless of the funding. This field differs from the Registry field by the medium in which the data are collected. (Doses Administered data is derived from paper-based records whereas Registry data is derived from electronic records). This data can be collected from a one-year time frame, or from benchmarking any period of time.
Prior Ordering	A retrospective collection of the number of doses that a provider ordered over any period of time to determine the number of doses a project should send to that provider over a following year (without requiring the provider to order). This data can be collected from a one-year time frame, or from benchmarking any period of time.
Other	A retrospective collection of any data that is derived by a method that is not listed in the Source Data section, and used to calculate estimates for the same data in a following year. This data can be collected from a one-year time frame, or from benchmarking any period of time.

## Doses Administered Tab

Use the Doses Administered tab to establish the default options for calculations and navigation in the Doses Administered window. Use the options in this window to:

- Use an alternate Doses Administered form that displays the age categories in a row across the page rather than in vertical columns
- Enable or disable the field that determines whether a vaccine is **public** or **private**
- Enable or disable the field that determines how many doses are given in a **series**
- Always repopulate new *Doses Administered* windows with vaccine information (**repeat vaccine**) that was entered in the previous record
- Jump past all of the age group fields to the Unknown field for **all providers**
- Jump past all of the age group fields to the Unknown field for **private providers** only
- Jump to the 1 Year field if the number of doses in a series is equal to 4 or greater
- Jump to the 1 Year field for all MMR and Varicella vaccines
- Jump to the (6-9 or 7-10) Year field for Td vaccines
- Jump from the (5 or 3-5) Year field to the Unknown field for Hib vaccines
- Jump from the (6 or 6-9) Year field to the Unknown field for DTP, DT, DTaP, OPV and EIPV vaccines
- Jump from the (15-19 or 13-18) Year field to the Unknown field for Td vaccines

## Miscellaneous Tab

Use the Miscellaneous tab to establish the default options for calculations and navigation in the Doses Administered window. Use the options in this window to:

- Allow your project to place Varicella orders
- Display a warning if an order duplicates the distribution date, PIN, and vaccine type of an order that was previously entered for a provider
- Allow your project to place Bulk orders
- Define how the Provider pop-up window displays its data (either by the Provider's name, PIN, or additional information)
- Enable the lot number to be keyed into Provider Inventory
- Define how many days your project will allow for a short date for vaccine

**Setup - Data Options**

Registration | Define Names | Enrollment | Doses Admin | **Misc**

### Setup - Miscellaneous

**Distribution of varicella vaccine via Merck & Co.**  
☒ Enable provider orders of varicella via Merck

**Distribution from a Project Vaccine Depot**  
☒ Display warning message if a record already with the same distribution date, PIN and vaccine

**Inventory of a Project Depot**  
☒ Enable bulk orders via CDC to Project Depot(s)

**Provider Pop-Up Lists**  
Display By:  
☐ by Name  
☒ by PIN  
☐ by Additional ID

**Provider Inventory data entry**  
☒ Enable lot number field



**Short dating vaccines**  
90 How many days before expiration to short date?

## Zip Codes Setup




Use the Zip Codes window to enter and store all of your frequently used zip codes. In addition to each zip code number, you can record the associated city, county, and state. The records you enter in this window become available in a drop-down list wherever a Zip Code field is present.

Zip Code	City	County	State
46001	ALEXANDRIA	MADISON	IN
46001	DUNDEE	MADISON	IN
46001	INNISDALE	MADISON	IN
46001	LINCOLN HEIGHTS	MADISON	IN
46001	LINWOOD	MADISON	IN
46001	MCCARTHY ADDITIO	MADISON	IN
46001	MONROE	MADISON	IN
46007	FORT WAYNE	ALLEN	IN
46011	ANDERSON	MADISON	IN
46011	COUNTRY CLUB HEI	MADISON	IN
46011	EDGEWOOD	MADISON	IN



### How to Add a Zip Code

Step	Action
1	From the Setup tab in <i>VACMAN at a Glance</i> , click <b>Zip Codes</b> .
2	Click the <b>Add</b>  button in the toolbar.
3	Enter information in the <b>Zip Code</b> , <b>City</b> , <b>County</b> , and <b>State</b> fields.
4	Click the <b>Save</b>  button in the toolbar. The new record is in the table below the fields.

### How to Edit a Zip Code

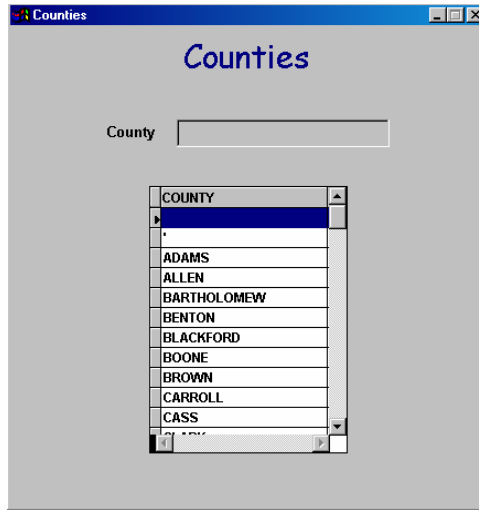
Step	Action
1	From the Setup tab in <i>VACMAN at a Glance</i> , click <b>Zip Codes</b> .
2	To select the record you want to edit, either use the navigation buttons in the toolbar or select  a record in the table at the bottom of the window.
3	Click the <b>Edit</b>  button in the toolbar.
4	Change the information in any of the fields.
5	Click the <b>Save</b>  button in the toolbar.

### How to Delete a Zip Code



Step	Action
1	From the Setup tab in <i>VACMAN at a Glance</i> , click <b>Zip Codes</b> .
2	To select the record you want to delete, either use the navigation buttons in the toolbar or select  a record in the table at the bottom of the window.
3	Click the <b>Delete</b>  button in the toolbar.
4	At the <i>confirm deletion</i> message, click <b>OK</b> to confirm you want to delete the record.
5	" <b>Deleted record</b> " appears in red text at the top of the window. This indicates that the record has been marked for deletion. However, the record will not be removed from the system until you Pack your data.

## Counties Setup



Use the Counties window to enter and store all of your frequently used counties. The records you enter in this window become available in a drop-down list wherever a County field is present.




### How to Add a County

Step	Action
1	From the Setup tab in <i>VACMAN at a Glance</i> , click <b>Counties</b> .
2	Click the <b>Add</b> button  in the toolbar.
3	Enter a county in the <b>County</b> field.
4	Click the <b>Save</b>  button in the toolbar. The new record is in the table below the field.

### How to Edit a County

Step	Action
1	From the Setup tab in <i>VACMAN at a Glance</i> , click <b>Counties</b> .
2	To select the record you want to edit, either use the navigation buttons in the toolbar or select ► a record in the table at the bottom of the window.
3	Click the <b>Edit</b>  button in the toolbar.
4	Change the information in the field.
5	Click the <b>Save</b>  button in the toolbar.

### How to Delete a County

Step	Action
1	From the Setup tab in <i>VACMAN at a Glance</i> , click <b>Counties</b> .
2	To select the record you want to delete, either use the navigation buttons in the toolbar or select ► a record in the table at the bottom of the window.
3	Click the <b>Delete</b>  button in the toolbar.
4	A <i>confirm deletion</i> message box appears. Click <b>OK</b> to confirm you want to delete the record.
5	" <b>Deleted record</b> " appears in red text at the top of the window. This indicated that the record has been marked for deletion. However, the record will not be removed from the system until you Pack your data.

## Depots Setup

Use the Depots window to record information about and set defaults for your project's depot(s). The records you enter in this window become available in a drop-down list wherever a depot field is present.





The screenshot shows the 'Depots' window with the 'Main' tab selected. The window title is 'Depots'. Below the title bar, there are two tabs: 'Main' and 'Addresses'. The 'Main' tab contains the following fields and controls:

- Depots**: A large blue text label.
- Last Name/Facility**: A dropdown menu with a small icon to its left.
- Updated**: A text field containing '05/07/2003'.
- By**: A text field containing 'NZD7'.
- more...**: A small blue text link.
- Memo**: A button.
- Depot PIN**: A text field containing '999998'.
- Facility Name**: A text field containing 'YOUR STATE'S IMMUNIZATION I'.
- Classification**: A dropdown menu with '30' selected.
- Varicella Eligible ?**: A checkbox that is unchecked.
- Status**: A dropdown menu with 'Y' selected.
- Status Date**: A text field containing ' / /'.
- Created**: A text field containing '07/12/1994'.





The screenshot shows the 'Depots' window with the 'Addresses' tab selected. The window title is 'Depots'. Below the title bar, there are two tabs: 'Main' and 'Addresses'. The 'Addresses' tab contains the following fields and controls:

- PIN 999998, YOUR STATE'S IMMUNIZATION PROGRAM, MAGNOLIA**: A large blue text label.
- Shipping Address fields**: A section header in blue text.
- Shipping Contact**: A text field containing 'YOUR DEPOT CONTACT'.
- Shipping Address**: A text field containing '123 MAIN STREET'.
- 2nd Address Line**: A text field containing 'SUITE 2200'.
- City, State, Zip**: Three fields: 'MAGNOLIA', 'GA' (dropdown), and '30303' (dropdown).
- Email**: A text field containing 'EMAIL@XYZ.XYZ'.
- Shipping Instructions**: A text field containing 'LIST ANY INSTRUCTIONS HERE SPECIFIC TO THIS DEPOT'.
- Phone**: A text field containing '(555) 555-1212'.
- Ext**: A text field containing ' (Opt)'.
- Fax**: A text field containing '(555) 555-1212'.
- Mailing Address**: A section header in blue text.
- Mailing Contact**: A text field containing 'YOUR DEPOT CONTACT'.
- Mailing Address**: A text field containing '123 MAIN STREET'.
- 2nd Address Line**: A text field containing 'SUITE 2200'.
- City, State, Zip**: Three fields: 'MAGNOLIA', 'GA' (dropdown), and '30303' (dropdown).
- Email**: A text field containing 'EMAIL@XYZ.XYZ'.
- Phone**: A text field containing '(555) 555-1212'.
- Ext**: A text field containing ' (Opt)'.
- Fax**: A text field containing '(555) 555-1212'.
- Copy Shipping**: A button.


## How to Add a Depot

Step	Action
1	From the Setup tab in <i>VACMAN at a Glance</i> , click <b>Depots</b> .
2	Click the <b>Add</b>  button in the toolbar.
3	Enter information in the Main and Addresses tabs.
4	To enter notes about the depot: <ol style="list-style-type: none"> <li>1. Click the Memo button on the main tab.</li> <li>2. Click the <b>Edit</b>  button in the toolbar.</li> <li>3. Enter your notes.</li> <li>4. Click the <b>Save</b>  button in the toolbar.</li> <li>5. Close the Notes window.</li> </ol>
5	Click the <b>Save</b>  button in the toolbar.

## How to Edit a Depot

Step	Action
1	From the Setup tab in <i>VACMAN at a Glance</i> , click <b>Depots</b> .
2	Use the navigation buttons in the toolbar to select the depot you want to edit.
3	Click the <b>Edit</b>  button in the toolbar.
4	Enter information in the Main and Addresses tabs.
5	To enter notes about the depot: <ol style="list-style-type: none"> <li>1. Click the <b>Memo</b> button on the main tab.</li> <li>2. Click the <b>Edit</b>  button in the toolbar.</li> <li>3. Enter your notes.</li> <li>4. Click the <b>Save</b>  button in the toolbar.</li> <li>5. Close the Notes window.</li> </ol>
6	Click the <b>Save</b>  button in the toolbar.

## How to Delete a Depot



Step	Action
1	From the Setup tab in <i>VACMAN at a Glance</i> , click <b>Depots</b> .
2	Use the navigation buttons in the toolbar to select the depot you want to delete.
3	Click the <b>Delete</b>  button in the toolbar.
4	At the <i>confirm deletion</i> message, click <b>OK</b> to confirm deletion the record.
5	“ <b>Deleted record</b> ” appears in red text at the top of the window. This indicated that the record has been marked for deletion. However, the record will not be removed from the system until you Pack your data.

## Manufacturers Setup




Use the Manufacturers window to enter and store information about all of the manufacturers that your project uses. The records you enter in this window become available in a drop-down list wherever a Manufacturer field is present.

Code	Short Name	Long Name	HL7 Code
CONN		CONNAUGHT LABORATORIES	PMC
LED		LEDERLE LABORATORIES	
MSD		MERCK SHARP AND DOHME	MSD
NABI		NORTH AMERICAN BIOLOGICAL	
SKB		SMITHKLINE BEECHAM	SKB
PRAXIS		LEDERLE-PRAXIS	WAL
WYETH		WYETH PHARMACEUTICALS	WAL
ARMOUR		ARMOUR PHARMACEUTICALS	AVB
ABBOTT		ABBOTT LABORATORIES	AB

### How to Add a Manufacturer


Step	
1	From the Setup tab in <i>VACMAN at a Glance</i> , click <b>Manufacturer</b> .
2	Click the <b>Add</b>  button in the toolbar.
3	Enter information in the <b>Code</b> , <b>Short Name</b> , <b>Long Name</b> , <b>HL7</b> , and <b>Other Code</b> fields above the table.
4	Click the <b>Save</b>  button in the toolbar. The new record is in the table below the fields.

### How to Edit a Manufacturer

Step	Action
1	From the Setup tab in <i>VACMAN at a Glance</i> , click <b>Manufacturer</b> .
2	To select the record you want to edit, either use the navigation buttons in the toolbar or select  a record in the table at the bottom of the window.
3	Click the <b>Edit</b>  button in the toolbar.
4	Change the information in any of the fields above the table.
5	Click the <b>Save</b>  button in the toolbar.



## How to Delete a Manufacturer

Step	Action
1	From the Setup tab in <i>VACMAN at a Glance</i> , click <b>Manufacturer</b> .
2	To select the record you want to delete, either use the navigation buttons in the toolbar or select ► a record in the table at the bottom of the window.
3	Click the <b>Delete</b>  button in the toolbar.
4	A <i>confirm deletion</i> message box appears. Click <b>OK</b> to confirm you want to delete the record.
5	" <b>Deleted record</b> " appears in red text at the top of the window. This indicated that the record has been marked for deletion. However, the record will not be removed from the system until you Pack your data.

## Vaccines Setup

Use the Vaccines window to add new vaccines to your database and set default definitions for each vaccine. The records you enter in this window become available in a drop-down list wherever a Vaccine field is present.

**Setup - Vaccine Types**

**Vaccines** [UnSorted] Updated **07/09/2001** By **GWEN**

Vaccine Code  Shortcut (for entering new records)

Description

Name to appear on invoices & ordering forms

Sort order (for some reports & forms)

Active (include on pop-up lists of vaccines)? ☒ Y

Available for distribution to whom?

Minimum provider order (doses)

Maximum doses administered

*Used for Vaccine ReOrder Recommendations Report:*

Stock level (number of days to keep on hand)

Order frequency (days between orders)

Delivery time (average number of days)

Reorder point (in number of doses)



*For Import/Export data exchange:*

HL7 Code  Other Code  CPT Code **90657**



HL7 Full Name **Influenza virus vaccine, split virus (incl. Purified surface antigen)**

Vaccine	Sort
FLU	75
DTAP	1
DT	3
TD	4
EIPV	8
RABIES	30
RIG	31
YF	33
JE	39
JE	39
DTP	15
DTP-HIB	16


## How to Add a Vaccine

Step	Action
1	From the Setup tab in VACMAN at a Glance, click <b>Vaccines</b> .
2	Click the <b>Add</b>  button in the toolbar.
3	Type in the vaccine's code, shortcut, and description within the first three fields, respectively.
4	Change any default information for that vaccine in the fields below the <b>Description</b> field.
5	Click the <b>Save</b>  button. The new record displays in the table on the right side of the window.

## How to Edit a Vaccine

Step	Action
1	From the Setup tab in <i>VACMAN at a Glance</i> , click <b>Vaccines</b> .
2	Use the navigation buttons in the toolbar to select the record you want to edit.
3	Click the <b>Edit</b>  button in the toolbar.
4	Change the information in any of the fields.
5	Click the <b>Save</b>  button in the toolbar.

## How to make a Vaccine inactive

Step	Action
1	From the Setup tab in <i>VACMAN at a Glance</i> , click <b>Vaccines</b> .
2	Use the navigation buttons in the toolbar to select the vaccine you want to make inactive.
3	Click the <b>Delete</b>  button in the toolbar.
4	At the <i>confirm</i> message, click <b>Yes</b> to confirm you want to make this vaccine inactive.
5	This vaccine is now marked as inactive and will not show up on the pop-up list of available vaccines.

## Funding Setup

Use the Funding window to enter and store information about all of the funding that your project receives. The records you enter in this window become available in a drop-down menu wherever a Funding field is present.

**Funding** Updated // By

Funding Code  Short Name

Full Name

Amount Date  Total Adjustments



Amount  Orders

Balance



Adjustments:

Adj Date	Description	Amount


## How to Add Funding

Step	Action
1	From the Setup tab in <i>VACMAN at a Glance</i> , click <b>Funding</b> .
2	Click the <b>Add</b>  button in the toolbar. <b>Note:</b> You cannot add records with funding codes 1, 2, or 3. These codes are used for VFC, G317, and State funding.
3	Enter information in the fields above the table.
4	Click the <b>Save</b>  button in the toolbar. The new record is in the table below the fields.

## How to Edit Funding



Step	Action
1	From the Setup tab in <i>VACMAN at a Glance</i> , click <b>Funding</b> .
2	Use the navigation buttons in the toolbar to select the record you want to edit.
3	Click the <b>Edit</b>  button in the toolbar.
4	Change the information in any of the fields above the table.
5	Click the <b>Save</b>  button in the toolbar.

## How to Delete Funding

Step	Action
1	From the Setup tab in <i>VACMAN at a Glance</i> , click <b>Funding</b> .
2	Use the navigation buttons in the toolbar to select the record you want to delete. <b>Note:</b> You cannot delete Federally assigned funding.
3	Click the <b>Delete</b>  button in the toolbar.
4	At the <i>confirm deletion</i> message, click <b>OK</b> to confirm you want to delete the record.
5	" <b>Deleted record</b> " appears in red text at the top of the window. This indicates that the record has been marked for deletion. However, the record will not be removed from the system until you Pack your data.



## How to Add Adjustments for Funding

Use the Modify Adjustments ( **MODI FY ADJ.** ) button to make adjustments to funding you have assigned within VACMAN.

Step	Action
1	From the Setup tab in <i>VACMAN at a Glance</i> , click <b>Funding</b> .
2	Use the navigation buttons in the toolbar to select the record you want to add funding adjustments.
3	Click the <b>MODI FY ADJ.</b> button.
4	Click the <b>Add</b>  button in the toolbar.
5	Key in adjustment date, description and amount.
6	Click the <b>Save</b>  button in the toolbar. The new record is in the table below the fields.

## How to Modify Adjustments for Funding

Use the Modify Adjustments ( **MODI FY ADJ.** ) button to make adjustments to funding you have assigned within VACMAN.

Step	Action
1	From the Setup tab in <i>VACMAN at a Glance</i> , click <b>Funding</b> .
2	Use the navigation buttons in the toolbar to select the record you want to modify.
3	Click the <b>MODI FY ADJ.</b> button.
4	Select ► the record you want to adjust in the table at the bottom of the window.
5	Click the <b>Edit</b>  button in the toolbar.
6	Change the information in any of the fields above the table.
7	Click the <b>Save</b>  button in the toolbar.

## CDC Contracts (view only)

Use the Contracts window to **view** the current contracts that CDC has with vaccine manufacturers. The Contracts window is **view-only** and is automatically updated in VACMAN by CDC. Contract information includes:

- Vaccine name
- Vaccine description
- Manufacturer name
- NDC number
- CDC contract number
- The dates that the contract starts and ends
- The number of doses per package
- The cost per dose
- The minimum number of doses that are required per order

**CDC Vaccine Contracts (View Only)**

### CDC Contracts

Vaccine: **DTAP**      Supplier: **AVENTIS**

Description: **DTAP W/O THIMEROSAL, 10 X 1 DOSE VIAL PACKAGE**

NDC No: **49281-298-10**      Doses Per Pkg: **10**

CDC Contract: **200-2002-00364**      Cost Per Dose: **13.2500**

Contract Starts: **03/07/2002**      Ends: **03/31/2003**      Minimum Order: **750**

Vaccine	Supplier	Dose/Pkg	Cost/Dose	Starts	Ends
DTAP	AVENTIS	10	13.2500	03/07/02	03/31/03
DTAP	SKB	10	11.7500	03/07/02	03/31/03
DTAP	SKB	25	12.2000	03/07/02	03/31/03
DTAP-HIB	AVENTIS	5	23.4000	04/01/02	03/31/03
EIPV	AVENTIS	10	8.8000	04/01/02	03/31/03
EIPV	AVENTIS	10	8.8000	04/01/02	03/31/03
FLU	AVENTIS	10	5.5250	04/26/02	01/31/03
HEP A	MSD	10	11.1500	04/01/02	03/31/03
HEP A	MSD	10	11.1500	04/01/02	03/31/03
HEP A	SKB	1	11.1500	04/01/02	03/31/03

## Setup for Forms

Ordering forms and Shipping Invoices are frequently used when ordering vaccines and managing vaccine inventory. However, once established, instructions for invoices and forms seldom change. Forms setup involves:

- Assigning defaults to ordering forms and shipping invoices
- Entering the instructions to be printed with ordering forms and shipping invoices
- Determining the number of invoice copies to print and to whom each copy is distributed

## Shipping Invoices

Use the Shipping Invoices window to determine the number of invoice copies to print and to whom each copy is distributed, enter the instructions that you want to be printed with each shipping invoice.

If your project depot is shipping vaccine, you will need to print shipping invoices. You have the option of printing up to three copies of the invoice for each order. You can print these copies with or without shipping instructions. CDC recommends printing these with shipping instructions, since you can give providers additional information about the order.

**Note:** Full file layout and condensed file layout has to do with saving the file to a different format (.dbf, .xls, .txt) or for exporting the data. If you save it to a full file format, you will have 45 fields, which include optional user-defined fields. If you save in a condensed file layout, you will have 29 fields.

**Shipping Invoices**

To print only one copy (original copy), enter information in the 1st Copy Line only.  
The Form Name will generally be "Shipping Invoice" for all copies

	Copy Title (Top Line):	Form Name (3rd Line):
1st Copy:	office copy	Shipping Invoice #1
2nd Copy:		
3rd Copy:		

Selected Invoice Form:

Instructions (used when Selected Invoice Form is "Invoice With Instructions"):

IMPORTANT NOTES ON RECEIVING VACCINES:  
1) Check temperature, shelf life and condition of each package.  
2) Check quantities, lot numbers and expiration dates against invoice.  
3) Varivax in freezer and all other vaccines in fridge.  
4) Make sure that earliest expiration dates are in front of storage

View

CALL THE IMMUNIZATION PROGRAM IMMEDIATELY AT 1-888-747-4687 ABOUT DISCREPANCIES BETWEEN THIS INVOICE AND WHAT YOU ACTUALLY RECEIVED.




View

When vaccines are spoiled or expired or lost to use for any reason, notify the Immunization Program. DO NOT discard spoiled or expired vaccines without notifying the ISMA!!

View

☒ Full file layout    ☐ Condensed file layout

## How to Edit a Shipping Invoice

Step	Action
1	From the Setup tab in <i>VACMAN at a Glance</i> , click <b>Shipping Invoice</b> .
2	Click the <b>Edit</b>  button in the toolbar.
3	Enter who the copies go to in the <b>Party</b> field.
4	Enter the title of the form in the <b>Title</b> field.
5	Select which invoice you want to use from the <b>Invoice</b> field.
6	Click the <b>Edit</b>  button next to the instruction text boxes to enter or edit instructions.
7	Click the <b>Save</b>  button in the toolbar.



## Order Forms

You can send vaccine order forms to your providers. Options include a basic order form, plus doses on hand, wasted doses and information sheets.

**Provider Ordering Form Options**




**Select the Ordering Form:**

Provider Ordering Form 2 = Form 1 plus Doses on Hand

**Instructions (printed under the heading "INSTRUCTIONS FOR COMPLETING THIS FORM" on the order form):**

Please fill in the number of doses that you are requesting for these two vaccines.

## How to Edit a Form

Step	Action
1	From the Setup tab in <i>VACMAN at a Glance</i> , click <b>Order Forms</b> .
2	Click the <b>Edit</b>  button in the toolbar.
3	Select which form you want to edit from the <b>Form</b> field. Forms include: <ul style="list-style-type: none"> <li>• Provider Ordering Form 1 = Basic Data</li> <li>• Provider Ordering Form 2 = Form 1 plus Doses on Hand</li> <li>• Provider Ordering Form 3 = Form 2 plus Wasted Doses</li> <li>• Provider Ordering Form 4 = Form 3 plus Info Sheets</li> </ul>
4	Enter, change, or delete  the instructions you want to edit.
5	Click the <b>Save</b>  button in the toolbar.

## Provider Categories

The Define Names tab under the Customized Section is where you name category windows and various fields according to your project's needs.

After you have named the category windows, you can click on their new customized links (under the Project Windows section) to customize the data within the windows.

For example, you might name one of the windows "Specialties" and, within the window, assign specific codes to different specialties (like Pd=Pediatrician, Gp-General Practitioner, etc.).

The screenshot shows a window titled "Setup - Subdivisions" with a tab labeled "District". At the top right, there is a dropdown menu set to "UnSorted". Below this, the "Short Name" field contains "AREA 1" and the "Long Name" field contains "NORTHWEST STATE". A section titled "Optional Data" contains several input fields: "Contact" (JOHN DOE), "Address 1" (123 MAIN STREET), "Address 2" (SUITE 2022), "City" (MAGNOLIA), "State" (IN), "Zipcode" (46312), "County" (LAKE), "Fax" ((555) 555-2121), "Phone" ((555) 555-1212), and "Ext" (empty).

The screenshot shows a window titled "SETUP - Ship To?". It has a "Code:" field with "N" and a "Description:" field with "SHIP TO?". Below these is a table with two columns: "Code" and "Description".

Code	Description
N	SHIP TO?
NO	SHIP TO?
Y	SHIP TO?
YES	SHIP TO?

\*\*\*